

WORKSHEET FOR PAYMENT REQUEST FORM

(Save Worksheet. Do not return with Payment Request.)

The Foundation relies on Truman Scholars to calculate their scholarship payments on the *Truman Scholar Payment Request Form (PRF)*. To determine the amount the Foundation owes you, use the *Worksheet for Payment Request Form* (below) and follow these instructions for its completion. Do not submit this worksheet with you PRF.

You will need the information provided by the Financial Aid Office on the **Truman Scholar Educational Expenses and Support Form (EESF)** to calculate your payment request. You must submit the EESF with your first payment request of the academic year and with a request for support for summer study even if you receive no other Financial Aid except the Truman Scholarship.

Part A: Expenses

Lines A1-A5: Enter the amounts from the EESF for Tuition, Fees, Books, Room and Board on Lines A1-A4 and total in Line A4a. Enter Additional Expenses on Line A5.

Lines A6, A7, A9, A11: The figures from the EESF are for the entire school year. Divide the figures in Lines A1, A2, A4 and A5 by 2 if you will be on a semester system or by 3 if you are on a trimester or quarter system to make the entries on Lines A6, A7, A9 and A11.

Line A8: The Foundation's maximum payment per year for books is \$1000. Divide the figure from the EESF by 2 (semester) or 3 (trimester or quarter). Enter the lower of the maximum figure (\$500 or \$333) or the EESF figure (divided by 2 or 3).

Line A10: Add Costs from Lines A6-A9 and enter total.

SUMMER SCHOOL:

If you are making a payment request for a summer term you must:

1. Obtain a new signed EESF with part 8a and 9 completed for the summer term.
2. Leave Lines A1-A5 of the Worksheet blank.
3. Transfer the amounts from 8a of the EESF to Lines A6, A7, A8, A9 & A11.
4. Proceed with Worksheet according to directions.

Part B: Financial Support and Aid for THIS TERM.

Do not include your own earnings or savings, repayable loans, support from your family or support from the Department of Veteran Affairs.

Include all scholarships, grants and tuition and fee waivers you will receive this term other than the Truman Scholarship. This covers: Fellowships, Pell Grants and all other need-based or merit-based assistance.

Enter amounts for this **THIS TERM** only.

Undesignated Support: Classify the support as **Undesignated** if the source of the support does not specify how the support is to be used. Pell Grants are an example of undesignated support.

Designated Support: Classify the support as **Designated** if the source specifies how it is to be used. For example: tuition, tuition and books; or, tuition and room and board. Tuition and fee waivers are designated support.

Lines B1-5: List all sources and amounts of **undesignated** support. If you have more than five undesignated sources, list the additional ones with the amounts on separate sheet.

Line B6: Add the amounts on Lines B1-5 plus any other **undesignated** support you have listed on a separate sheet and enter the total here.

Lines B7-11: List the sources and amounts of **designated** support. If you have more than five designated sources, list the additional ones with the amounts on a separate sheet.

Line B12: Add the amounts on Lines B7-B11 plus any other **designated** support you have listed on a separate sheet and enter the total here.

Part C: Maximum Truman Scholarship Payments

Line C1: Check appropriate box and enter the amount on Line C2a.

Line C2a: Enter the amount from Line C1. Enter this amount on Line 13d of the **PRF**.

Line C2b: Enter the amount already received from the Truman Scholarship Foundation for any previous term(s) this academic year. If this is the fall term, the amount should be zero (-0-) unless you made a request for a summer term. Enter this amount on Line 13e of the **PRF**.

Line C2c: Subtract Line C2b from Line C2a. This is the maximum amount of payment available for this term. Enter this amount on Line D9.

Part D: Payment Request Calculation

Line D1: Undesignated support: Enter the amount from Line B6

Line D2: Additional Expense: Enter the amount from Line A11.

Line D3: Remaining Undesignated Support: Subtract Line D2 from D1. Enter the result on Line D3. If Line D2 is larger than D1, enter zero (-0-).

Line D4: Designated support: Enter the amount from Line B12.

Line D5: Add Lines D3 and D4 and enter the amount on Lines D5 and D7.

Line D6: Total Allowable Expense: Enter the amount from Line A10.

Line D7: Enter the amount from Line D5.

Line D8: Subtract Line D7 from D6 and enter the amount here.

Line D9: Maximum Payment: Enter the amount determined in C2c.

Line D10: Payment request: Enter D8 of D9, whichever is smaller. Enter on Line 13f of PRF.

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Part A: Expenses

Costs for Academic Year from EESF	Costs for THIS TERM
A1. Tuition	A6. Tuition Enter on Line 12a of PRF
A2. Fees	A7. Fees Enter on Line 12b of PRF
A3. Books	A8. Books Enter on Line 12c of PRF
A4. Room & Board	A9. Room & Board Enter on Line 12d of PRF
A4a. Total Allowable Expenses Total A1-A4	A10. Total Allowable Expenses Total A6-A9. Enter on Line D6, Line 12e and 13a of PRF
A5. Additional Expenses	A11. Additional Expenses Enter on Line D2 and Line 12f of PRF

Part B: Financial Support and Aid for THIS TERM.

(If you will have no support other than the Truman Scholarship, enter 0 in Line B6 and Line B12)

Undesignated Support

	Source	Amount
B1		
B2		
B3		
B4		
B5		
B6	Total: (Enter on Line D1)	

Designated Support

	Source	Amount
B7		
B8		
B9		
B10		
B11		
B12	Total: (Enter on Line D4)	

Part C: Maximum Truman Scholarship Payments

C1. Maximum Annual Payment. Enter amount on Line C2a.

Undergraduate Study: \$3,000

Graduate Study: One or two year graduate program: \$13,500

Three or more year graduate program: \$9,000

Other \$ _____

C2. Maximum Payment for THIS TERM.

a. Maximum Amount for Academic Year (from C1). Enter on Line 13d of PRF _____.

b. Amount Received for previous term(s) of this academic year. Enter on Line 13e of PRF. _____.

c. Subtract Line C2b from Line C2a. This is the maximum available for THIS TERM. Enter on Line D9. _____.

Part D: Payment Request Calculation

Line D1 Undesignated Support (Line B6) _____.

Line D2 Additional Expenses (Line A11) _____.

Line D3 Remaining Undesignated Support, Subtract Line D2 from D1. If Line D2 > D1, enter 0. _____.

Line D4 Designated Support (Line B12) _____.

Line D5 Total Deductible Support (add Lines D3 and D4)
Enter in Line D7 and Line 13b of PRF _____.

Line D6 Total Allowable Expenses (Line A10). Enter on Line 13a of PRF. _____.

Line D7 Total Deductible Support (Line D5) _____.

Line D8 Expenses Eligible for Payment (subtract Line D7 from Line D6). Enter on Line 13c of PRF. _____.

Line D9 Maximum Payment (Line C2c) _____.

Line D10 Payment Request: Enter the smaller of Line D8 or Line D9. Enter on Line 13f of PRF. _____.